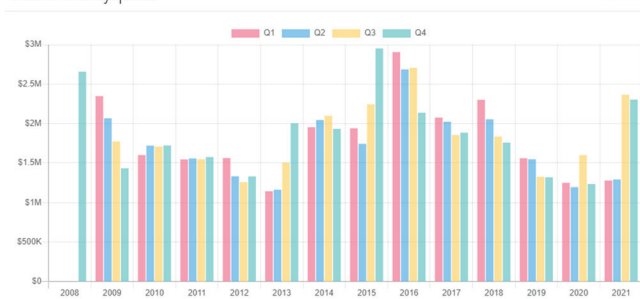




DONORCENTRAL USER GUIDE

FOR DONOR-ADVISED FUNDS

Market value by quarter



WELCOME TO DONORCENTRAL, your online connection to information about your fund at Akron Community Foundation. This free, password-protected service enables you to download your quarterly fund statements, monitor your fund's market value, access gift information, recommend grants, and more.

GETTING STARTED

You will receive a welcome email from **mailout@donorcentral.com** with a link to the DonorCentral user confirmation page. (Be sure to check your spam folder if you do not find the email in your inbox.) Your user ID for DonorCentral is the email address on record at the foundation to which the welcome email was sent.

After clicking the link in the welcome email, please follow the requirements outlined on the user confirmation page to create your password. You will receive a confirmation email from **noreply@blackbaud.com** verifying your identity and prompting you to sign in for the first time.

Alternatively, if you already have a Blackbaud ID with this email address, click "Already have an account? Sign in" at the bottom of the page to log in with your existing account. You can also click the "Sign in with Google" button to log in to DonorCentral through your Google account if your DonorCentral email address is a Google address. Note: If in the future you change your email address on record at the foundation, you will need to complete the DonorCentral registration process again and sign in with your new credentials going forward.

Once you have completed the initial login process, you can return to DonorCentral by visiting **akroncf.donorcentral.com**. We encourage you to bookmark this page. You can also access DonorCentral through Akron Community Foundation's website at **akroncf.org**. The Fundholder Login link is available in both the footer of the site and on the Fundholders page as shown below.

Contact Us

Akron Community Foundation
345 West Cedar Street
Akron, OH 44307

Phone: 330-376-8522
Fax: 330-376-0202

Quick Links

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Fundholder Login


GO TO DONORCENTRAL

PLEASE DO NOT SHARE your DonorCentral login information. If another advisor to your fund needs access to DonorCentral, please reach out to your primary contact for assistance.

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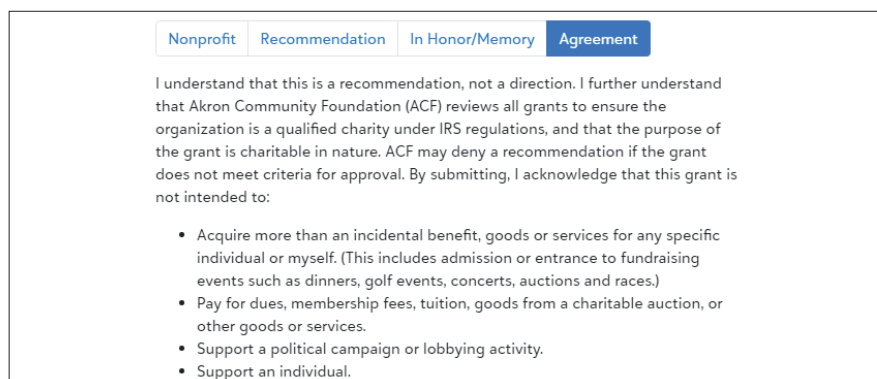
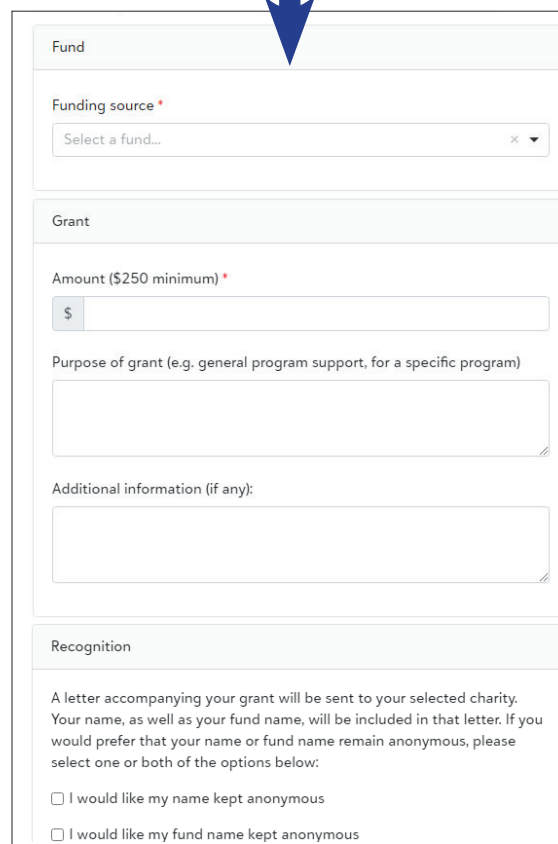
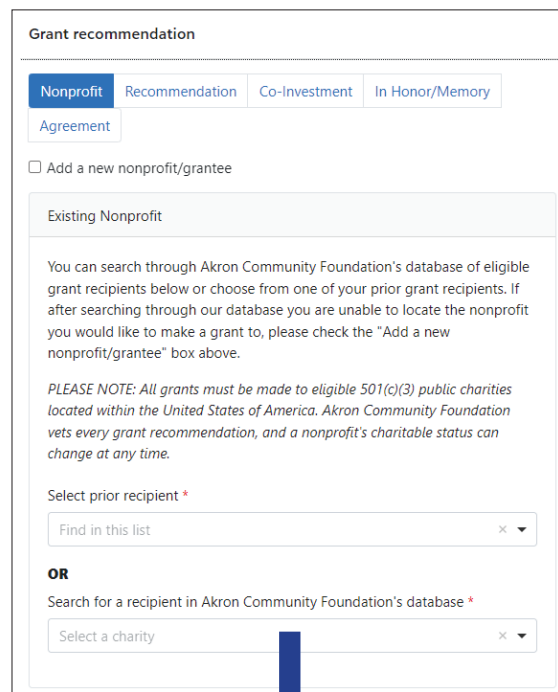
RECOMMEND A GRANT

DonorCentral makes it easy for you to recommend a grant from your fund. You can replicate previous grants you have made or, using the foundation's nonprofit database, research charities and recommend a new grant.

1. From the Home dashboard, locate the "View your fund details" section.
2. Select "Recommend a grant" next to your fund name.
The Grant Recommendation screen will appear. 
3. Select a prior grant recipient or search for another charity in the foundation's database. In the rare instance a nonprofit does not already exist in our database, check the "Add a new nonprofit/grantee" box.* Select Next.
4. In the Fund section, select the fund you want to use for this recommendation. You can keep the fund selected or search for a different fund by typing in the field provided.
5. In the Grant section, enter the amount, grant purpose, and any additional information.
6. In the Recognition section, select your recognition preference for the letter that will be sent to your selected charity along with your grant. Select Next.
7. If your grant is part of our co-investment program, check the box in the Co-Investment section.
8. Complete the In Honor/Memory section if you would like your grant to be awarded in honor or memory of someone. Enter the person's name, grant notification information, and any additional comments. Select Next.
9. Accept the terms by checking the "I agree" box and select Review.
10. Verify your grant details and select Submit. You will receive an email confirmation.

Note: At any time in the process, you can click "Save for Later" to store your grant recommendation without submitting. To return later and complete it, look for it in the "Unsubmitted recommendations" section of the Home dashboard.

*All grants must be made to eligible 501(c)(3) public charities located within the United States. The foundation vets every grant recommendation, and a nonprofit's charitable status can change at any time. There may be a delay in processing grants to new charities due to additional verification and paperwork requirements.



Nonprofit Recommendation In Honor/Memory **Agreement**

I understand that this is a recommendation, not a direction. I further understand that Akron Community Foundation (ACF) reviews all grants to ensure the organization is a qualified charity under IRS regulations, and that the purpose of the grant is charitable in nature. ACF may deny a recommendation if the grant does not meet criteria for approval. By submitting, I acknowledge that this grant is not intended to:

- Acquire more than an incidental benefit, goods or services for any specific individual or myself. (This includes admission or entrance to fundraising events such as dinners, golf events, concerts, auctions and races.)
- Pay for dues, membership fees, tuition, goods from a charitable auction, or other goods or services.
- Support a political campaign or lobbying activity.
- Support an individual.

(Cont.)


EXPLORE GRANT OPPORTUNITIES

As a fundholder, you have the opportunity to participate in Akron Community Foundation's grant co-investment program, which enables donor-advised fundholders to review the board's competitive grant applications and support initiatives that align with their charitable interests. To view these grant opportunities, navigate to the Home tab and locate the Explore Grant Opportunities section in the dashboard. Click the "View Application" link to review the grant request in a new browser window. When you find a program you wish to support, click the "Recommend a Grant" button. The Grant Recommendation window will appear. For instructions on recommending

a grant, see the "Recommend a Grant" section above.

Please note that these applications are considered confidential and should only be used for grantmaking decisions related to your fund. Please do not contact the organizations about their requests; all questions should be directed to our community investment team.

Explore grant opportunities



Akron Children's Museum

Akron Children's Museum

to produce a Virtual Mobile Museum in a Box.

[View Application](#)

Grant Request: \$15,000

[Recommend a grant >](#)

Suggested Range: \$250-\$5,000

VIEW YOUR FUND INFORMATION

DonorCentral offers easy access to comprehensive information about your fund, including the ability to view, print and email fund statements. To view your fund information, you can select either the Funds tab or the Home tab at the top of your screen.

- From the Home dashboard, in the "View your fund details" section, click "See more fund details." This takes you to the Funds tab.
- On the Funds tab, advisors with multiple funds can select their desired fund with the blue "Select funds" button. You may also select more than one fund to view combined data for your funds.

Once you have selected a fund, you can use the tabs above the date range fields to view the fund's grant and gift history and market value. Be sure to select your desired date range using the dropdown menu or custom date fields. In the Fund Details section, click one of the totals to display all related records and details in the grid below. Hover over the information bubble to view an explanation of the total. Please note that allocations to spendable income are completed the month following the end of each quarter. You can also click on the "Market value" tab to view your fund's market value by quarter. To view or email your fund statement, click the associated buttons under your fund name near the top of the page. Please note that statements can only be sent to the email address you use to log in to DonorCentral; however, you may forward the statement to others if needed. Review the Understanding Your Fund Statement insert in the Resources section of DonorCentral for information about reading your statement.

Fund Information

Period: All

\$37,307.00

Grants pending

\$36,885.00

Grants paid

\$89,400.00

Gifts

\$11,100.00

Non-gifts

\$16,300.00

Pledges paid

\$0.00

Pending suggestions

\$6,100.00

Expenses

100.00

Disbursements

\$6,100.00

Stock Gifts In Transit

-\$2,800.00

Assets

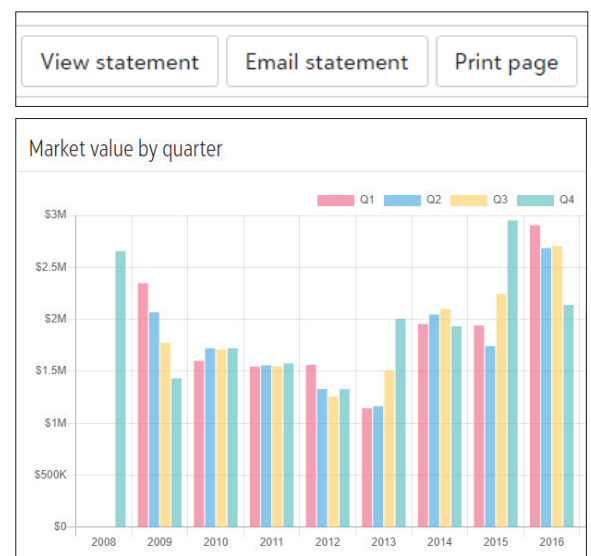
Grants paid: \$36,885.00

(8 records)

Export

Find in this list

Date	Description	Amount	Grantee	Payment Status
5/1/2017	Support staff	\$86.00	United Way	
5/1/2017	Operating expenses	\$7,740.00	Girl Scouts of America	
5/1/2017	Operating expenses	\$1,400.00	Boy Scouts of America	
4/25/2017	Operating expenses	\$7,200.00	Toys for Tots	
4/2/2016	Operating expenses	\$254.00	Toys for Tots	

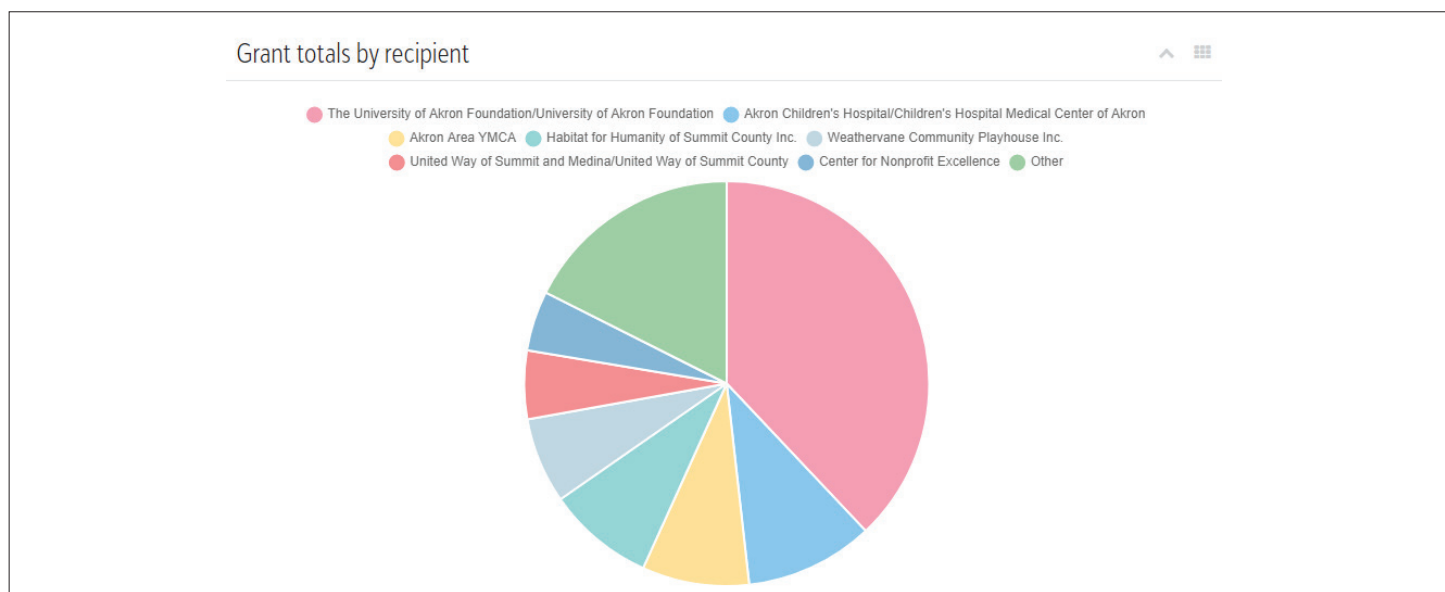
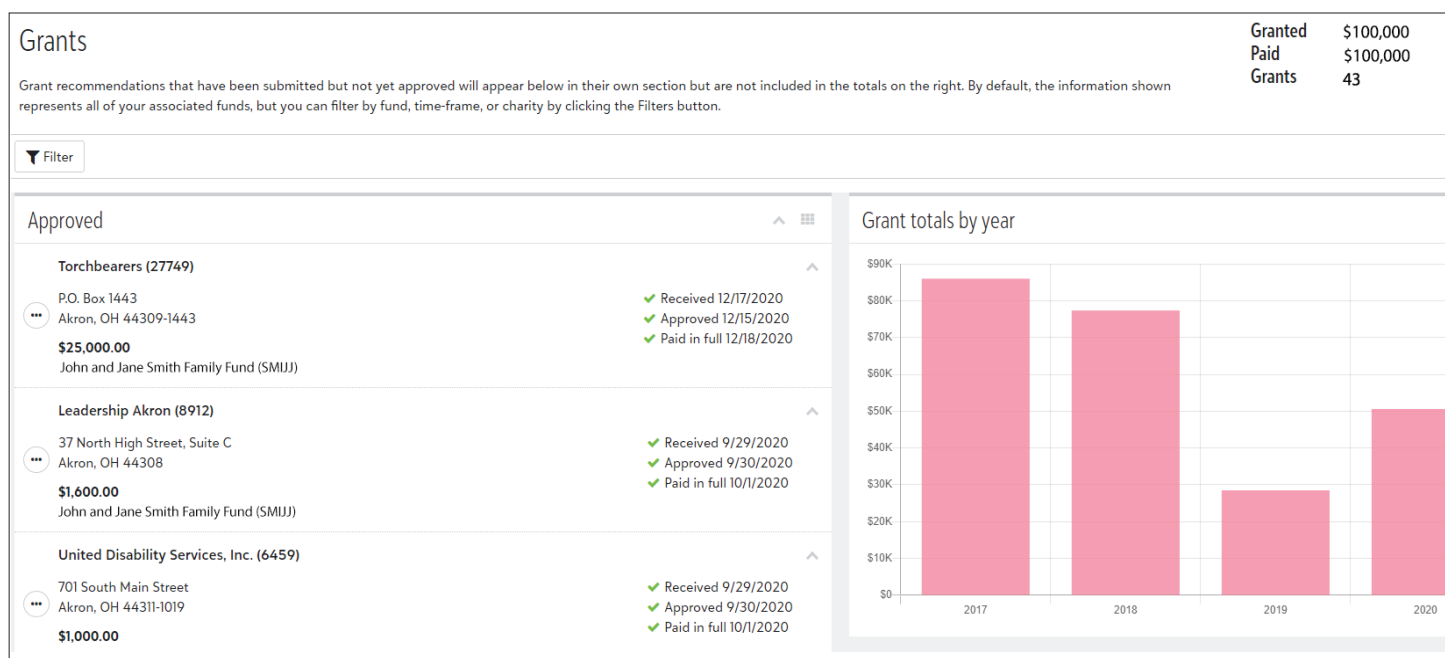


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VIEW YOUR GRANT HISTORY

DonorCentral offers an extensive and interactive view of your fund's grant history. To view your grant information, you can select either the Grants tab or the Home tab at the top of your screen. From the Home dashboard, in the "See your grants" section, click "View all grants" at the bottom. This takes you to the Grants tab.

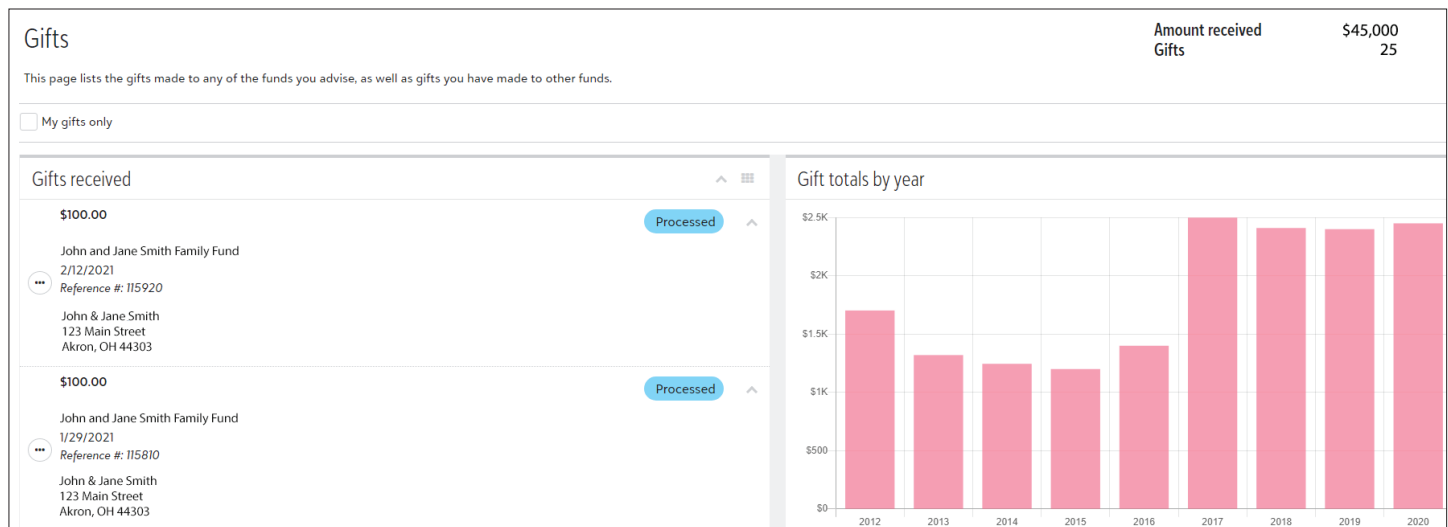
Here you can view all of your approved grants and see charts displaying your grant totals by calendar year and by recipient. The totals in the upper right-hand corner reflect the complete history of your fund. Grant recommendations that have been submitted but not yet approved will appear in their own section on this page but are not included in the totals. You can also use the Filter button to customize your grant history information by fund, grantee or date. Your most recent grants will be displayed first. You may notice a series of letters and/or numbers appearing in parentheses after your fund name – this is for internal use only and is not part of your fund name. Each grant will show the date it was received (entered into the foundation's system), approved, and paid (check printed and mailed). The grantee address shown is the primary address on record at the foundation and may not be the address the grant check was sent to. Grant checks cannot be reissued until 90 days after the date they were printed.



(Cont.)

VIEW YOUR GIFT HISTORY








Through your DonorCentral account, you can view a complete history of gifts to your fund. To view your gift information, click the Gifts tab at the top of your screen. On the Gifts page, you can view at a glance the total dollar amount given to your fund and the total number of gifts in the top righthand corner. The Gifts Received section shows all gifts that have been made to your fund, beginning with the most recent. Note that most gifts take up to three days to appear in DonorCentral, and more complex gifts may take longer. To view more details about a particular gift, click the ellipses button to the left of the gift and select either Quick Glance or View Details. If you would like to view only your own gifts, select the "My gifts only" box near the top of the page (this may not include gifts you've made jointly with your spouse or your spouse's gifts). The Gift Totals By Year section shows a bar graph summary of each year's total gift amount. Hover over a bar on the graph to view the specific dollar amount given in a particular year. Please note that gifts displayed in DonorCentral are for informational purposes only and should not be relied on for tax purposes. Please refer to the official tax acknowledgment you received from Akron Community Foundation or contact the foundation for another copy.



ACCESS RESOURCES & CONTACT US

Your DonorCentral account provides many other helpful resources about your fund, including lists of frequently asked questions, tools for promoting your fund, information about bequests and memorial giving, and more. To access these materials, click the Resources tab at the top of your screen.

Additionally, you can contact a member of our staff directly by clicking the Contact Us tab at the top of your screen. Although your primary staff contact should be your main point of contact, you are welcome to reach out to any of our staff members if you have further questions about your fund. To make updates to your address and other personal information, please contact Cathy Kemp at **ckemp@akroncf.org** or 330-436-5616. We will return all emails and phone calls within two business days during normal business hours.

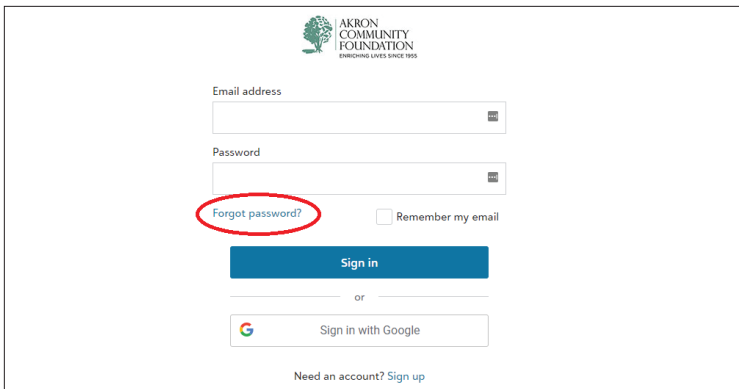
 John T. Petures Jr. President and CEO Email jpetures@akroncf.org Phone 330-436-5622	 Laura Lederer Vice President and Chief Development Officer Email llederer@akroncf.org Phone 330-436-5611	 Steve Schloenbach Vice President and Chief Financial Officer Email sschloenbach@akroncf.org Phone 330-436-5621	 John Garofalo Vice President, Community Investment Email jgarofalo@akroncf.org Phone 330-436-5624	 Karen Hrdlicka Director, The Center for Family Philanthropy Email khrdlicka@akroncf.org Phone 330-436-5640
 Cathy Kemp Grants Administrator Email ckemp@akroncf.org	 Brian Reitz Agency Endowment & Engagement Officer Email breitz@akroncf.org			

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RESET YOUR PASSWORD

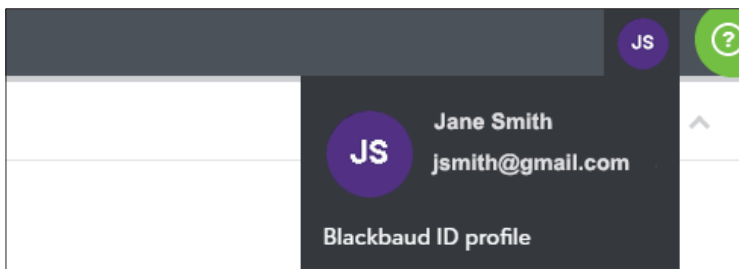
Please note that Akron Community Foundation is unable to manually reset passwords for our DonorCentral users. Users must visit the DonorCentral portal to reset their password directly.

If you have lost your current password and need to reset it, click the “Forgot password?” link on the login page and follow the prompts.

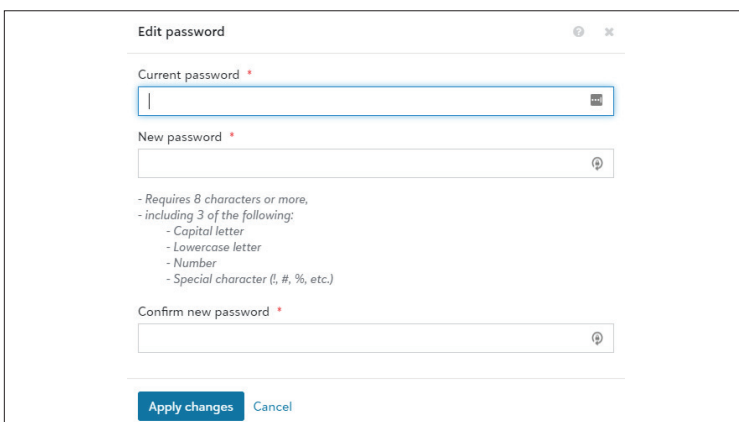


If you know your current password but would like to change it, please follow the instructions below:

1. On the far right-hand side of the navigation bar, click your user icon and select “Blackbaud ID profile.”



2. Click the “Edit password” button. The Edit Password screen will appear. Enter your current and new passwords.



3. Select “Apply changes.”

QUESTIONS? Reach out to your primary contact or send an email to donorcentral@akroncf.org.



IMPORTANT NOTE

As a DonorCentral user, you may be privy to confidential information regarding your funds, including but not limited to donor information, grant history information, and market values. All confidential information must be treated and maintained as strictly confidential because of its sensitive nature. This information must not be disclosed to any third party (absent express permission from Akron Community Foundation's president and CEO) or used for any purpose other than conducting your fund's business. Any donor addresses shown are for thank you purposes only and should not be used for solicitation. Please do not reference the gift amount in your communications or share this information publicly.

Any user who violates the rules and procedures set by the foundation for DonorCentral, or who wrongfully discloses or otherwise misuses any information found on DonorCentral, may be subject to account suspension or other penalties at the discretion of Akron Community Foundation.